

# State Construction Conference

March 23, 2010

## Designer Selection Process for Owners & Designers

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**WHY DO WE GO THROUGH  
THE DESIGNER SELECTION PROCESS?**



# WHY DO WE GO THROUGH THE DESIGNER SELECTION PROCESS?

**General Statute 143-64.31** (“Mini Brooks Act”)  
Declaration of Public Policy

**GS 143-64.31(a)**

Public Announcement

Qualifications Based Selection

Negotiate a Contract for Fair & Reasonable Fee with Best Qualified Firm

**GS 143-64.31(a1)**

North Carolina Resident Firm Granted Preference





## HOW WAS THE DESIGNER SELECTION PROCESS ESTABLISHED?

**GS 143-135.25** State Building Commission Authority

**GS 143-135.27** Definition of a State Capital Improvement Project

**GS 143-64.31** “Procurement of Architectural, Engineering, and Surveying Services”

**01 NCAC 30D** State Building Commission “Designer and Consultant Selection Policy”

### **Designer:**

Any Individual, Firm, Partnership, Corporation, Association, or Other Legal Entity Licensed to Practice Architecture, Engineering, or Landscape Architecture in the State of North Carolina

### **Licensing:**

North Carolina Board of Architecture

North Carolina Board of Examiners for Engineers and Surveyors

North Carolina Board of Landscape Architects.







# **WHAT IS IDENTIFIED IN THE DESIGNER SELECTION POLICY?**

**General Procedures for All Projects**

**Procedures for Major Projects**

**Procedures for Minor Projects**

**Special Procedures for Emergency Projects**

**Other Special Situations**





# WHAT IS IDENTIFIED IN THE DESIGNER SELECTION POLICY?

## Major Project

Any State Capital Improvement Project with a Total Estimated Expenditure greater than \$500,000

Any Study or Planning Activity with an Authorized Funding greater than \$50,000

Require Designer Interviews





## WHAT IS IDENTIFIED IN THE DESIGNER SELECTION POLICY?

### Minor Project

Any State Capital Improvement Project with a Total Estimated Expenditure \$500,000 or less

Any Study or Planning Activity with an Authorized Funding \$50,000 or less

Designer Interviews are not required







# WHAT IS IDENTIFIED IN THE DESIGNER SELECTION POLICY?

## Emergency Project

Exempt from Public Announcement requirement

Requires Written Declaration of Emergency







# PROCESS FOR SELECTION

State Agencies

Universities

Community Colleges



# WHAT IS THE STANDARD PROCEDURE FOR DESIGNER SELECTION BY STATE AGENCIES?

**Project Description**

**Public Announcement**

**Designer Qualifications**

**Pre-Selection**





# WHAT IS THE STANDARD PROCEDURE FOR DESIGNER SELECTION BY STATE AGENCIES?

## Selecting Criteria

1. Appropriate expertise
2. Past performance
3. Proposed design team
4. Current workload
5. Proposed design approach
6. Recent experience with project costs and schedules
7. Construction administration capabilities
8. Proximity to and familiarity with project area
9. Successfully completed projects
10. Other appropriate factors

## Final Designer Selection by the State Building Commission

## Contract Negotiation







# **WHAT IS THE STANDARD PROCEDURE FOR DESIGNER SELECTION BY UNIVERSITIES?**

**Project Description**

**Public Announcement**

**Designer Qualifications**

**Pre-Selection**

**Selecting Criteria**

**Final Designer Selection by the  
Board of Governors of the University of North Carolina  
(or by their delegated authority)**

**Results reported to the State Building Commission**





## **WHAT IS THE STANDARD PROCEDURE FOR DESIGNER SELECTION BY UNIVERSITIES?**

### **Contract Negotiation**

Performed in coordination with the State Construction Office for all University projects with a total estimated expenditure greater than \$2,000,000

Performed independently of the State Construction Office for all University projects with a total estimated expenditure of \$2,000,000 or less





## **WHAT IS THE STANDARD PROCEDURE FOR DESIGNER SELECTION BY COMMUNITY COLLEGES?**

**General Statute 143-64.31 applies to Local Governmental Units**

**Project Description**

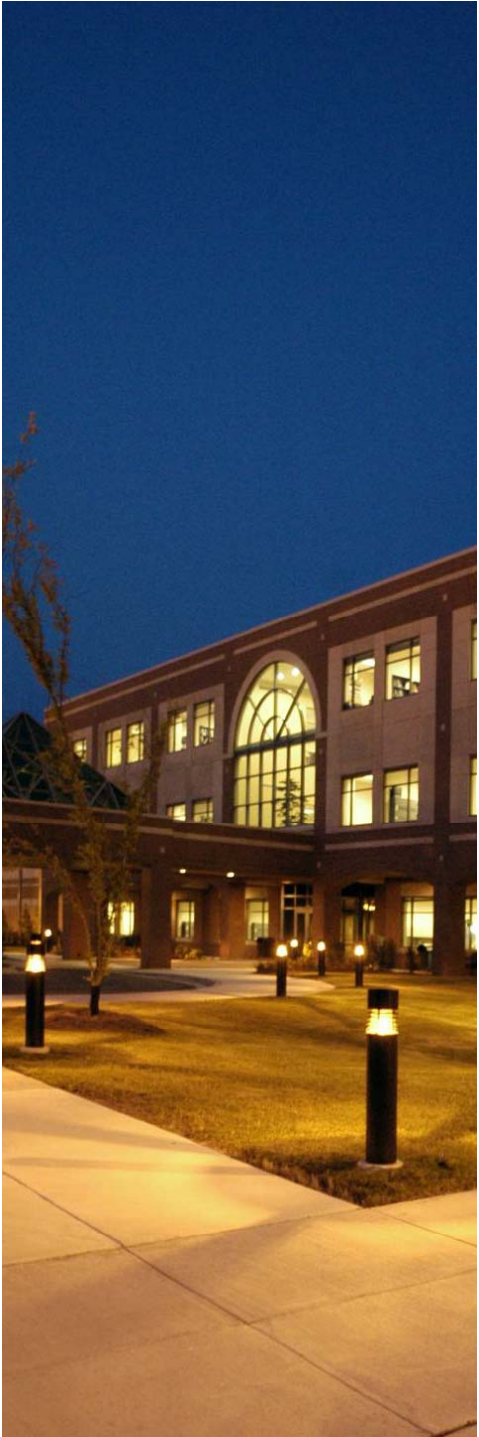
**Public Announcement**

**Designer Qualifications Assessment**

**Final Designer Selection by the Board of Trustees for the Community College**







## **WHAT IS THE STANDARD PROCEDURE FOR DESIGNER SELECTION BY COMMUNITY COLLEGES?**

### **Contract Negotiation**

Performed in Coordination with the State Construction Office for all Community College projects with a total estimated expenditure of greater than \$500,000

Performed Independently of the State Construction Office for All Community College projects with a total estimated expenditure of \$500,000 or less





## **EXEMPTION OF CERTAIN PROJECTS (2007 REVISION)**

### **General Statute 143-64.34**

**Capital Improvement Projects for State Agencies, Universities, and Community Colleges where the total estimated expenditure is less than \$500,000**

**Public Announcement not required**



A black and white photograph of a woman in a business suit sitting at a desk, viewed from the side. She is looking at a computer monitor and has her hands on a keyboard. The desk also has a mouse and a tablet. A blue banner with white text is overlaid on the image.

**SO YOU HAVE HEARD  
THERE IS A PROJECT...**



# WHERE DO YOU FIND OPPORTUNITIES FOR STATE PROJECTS?

## State Construction Office Website - (Short Term)

[www.nc-sco.com](http://www.nc-sco.com)

[www.ips.state.nc.us](http://www.ips.state.nc.us)

[www.northcarolina.edu](http://www.northcarolina.edu)

## Budget Bills for Legislature — (Long Term)

## Master Plans — (Long Term)

## Existing Relationships — (Both)





## **RESEARCH BEFORE RFP IS ANNOUNCED**

**Visit the site... with permission...**

**Be Courteous**

**What is the big idea for this project?**

**What are the hot button issues?**

**Has a specialty consultant been involved?**

**Is it actually funded?**

**Who is the client's client?**



A black and white photograph of architectural blueprints, rolls of paper, and a ruler. The blueprints are spread out, showing technical drawings and text. A ruler is placed in the foreground, showing measurements in inches and centimeters. A blue text box is overlaid on the center of the image, containing the text "WHAT ARE OWNERS LOOKING FOR IN THE DESIGN TEAM?".

# WHAT ARE OWNERS LOOKING FOR IN THE DESIGN TEAM?





## WHAT ARE OWNERS LOOKING FOR?

### 01 NCAC 30D.0303 Selecting Criteria

In selecting the three firms to be presented to the SBC, the pre-selection committee should take into consideration such factors as:

1. Specialized or appropriate expertise in the type of project.
2. Past performance on similar projects.
3. Adequate staff and proposed design or consultant team for the project.
4. Current workload and State of North Carolina projects awarded.
5. Proposed design approach for the project including design team and consultants.







## WHAT ARE OWNERS LOOKING FOR?

6. Recent experience with project costs and schedules.
7. Construction administration capabilities.
8. Proximity to and familiarity with the area where project is located.
9. Record of successfully completed projects without major legal or technical problems.
10. Other factors that may be appropriate for the project.

**The University System also identifies HUB participation of the proposed design team as an important factor.**





# WHAT ARE OWNERS REALLY LOOKING FOR IN A DESIGN TEAM?

1. Design competence
2. Strategic competence
3. Cooperation & teamwork
4. Cost sensitivity
5. Track Record & Project References
7. Experience with similar projects





## **WHAT ARE OWNERS REALLY LOOKING FOR IN A DESIGN TEAM?**

**8. Quality Documents & Attention to Detail**

**9. Proven Customer Service Focus**

**10. Value Proposition**

**11. HUB / MBE Participation History**

**12. Proven Consultants**

**13. Experience of the proposed office**

**14. Long term focused , ethical , and the advocate for all constituents while committed to the client.**



Opportunities to Do Business with the Universities

Designer Solicitations

Full Details

Institution : UNC - Chapel Hill Academic Affairs  
Institution URL for Additional Information about this Project (Optional) :

Project Name : Woollen Gymnasium Basement Renovation - Advance Planning  
Type of Services : Architectural/Engineering

Project Manager : Jerry U. Guerrier  
Phone Number : (919) 843-0849

Contact Email : jerry.guerrier@fac.unc.edu  
Closing Date : 03/04/2010

Project Budget : \$ 7,500,000

Project Description : One-Two Sentences  
Prepare advance planning documents for the reprogramming and renovation of the Woollen Gymnasium. This advance planning will include the code improvement to the existing basement, a new 4100 SF 2-hr rated floor over the existing squash courts and up-fitting the new space for two weight rooms, up-fitting two existing weight rooms into dance studios, relocation, renovation of existing men and women locker rooms, a new Family Toilet with shower and renovation of Athletic's Equipment Room with a Laundry and a Press Room. The project will require a pleasing construction. Current authorized funding is for advance planning only. The selected firm may be retained through full design and construction at the University's option. Please contact Project Manager by email for additional proposal information.

(Contact Person, Name of Institution & Address)  
Jerry U. Guerrier, Architect, Facilities Planning Department, UNC Chapel Hill, 103 Airport Drive, Campus Box 1090, Chapel Hill, NC 27599

Submit Letters of Interest and Current SF-254 TO:

SO THERE IS AN RFP





**Differentiate  
Yourself!**





## TOP 10 ISSUES FOR RFP RESPONSE

1. Once process begins, do not call your favorite board member.  
(Respect the process...)
2. Attend the pre-submittal meeting and ask questions.
3. Be prepared and listen. Take notes.
4. Be nice to everyone... Southern Hospitality
5. Cover letter is your opportunity to be specific... First 45 words.

*"During the selection process, we are trying to find the best fit for your project."*

Ryan Scruggs





## **TOP 10 ISSUES FOR RFP RESPONSE**

6. Identify big idea... What is your differentiator?
7. Identify the team clearly.
8. Why specialty consultants?
9. Follow outline for 10 selecting criteria ...(State process clearly)
10. Turn the response in on time and follow instructions

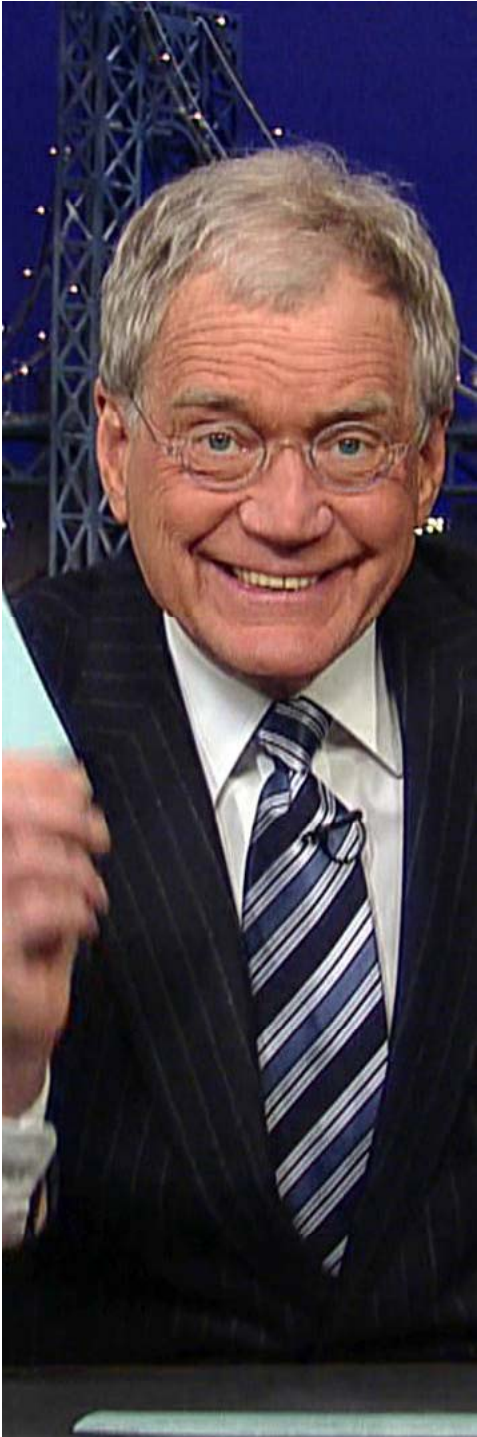


*"A couple of years ago we would get 15 responses to a project...  
Now we get over 50."*



**SO NOW YOU HAVE BEEN  
SHORTLISTED...  
CONGRATULATIONS!**





## **TOP 10 LIST - SUREFIRE WAYS TO BLOW AN INTERVIEW**

1. Stuffing your leave behind with \$100 bills.
2. Mistaking the Community College President as the IT tech . . . and calling her “Babe.”
3. Referring to one of your consultants as “what’s his name.”
4. Assuming that “DOA” stands for “dead on arrival.”
5. Asking your assistant to fire up the lap top and hearing “Uhh . . . what lap top?”
6. Being the first interview scheduled . . . and realizing that you missed the memo about switching to daylight savings time.
7. One word: “hangover”
8. Displaying the obvious fact that “you ain’t from around here” by referring to NC State as “Carolina.”
9. Having an salami sub for lunch and forgetting your breath mints.
10. Leaving your cell phone on during an interview . . . with your ring tone set to “I Like to Move it, Move It”





## **TOP THINGS FOR INTERVIEWS**

**Be on time and prepared**

**Name tags are good... card with pictures**

**Be confident and make eye contact while speaking**

**Bring the people that will work on the project... not just the head of firm.**

**Be sure technology works and bring a back up plan... Bring all your stuff.**

**Do not read PowerPoint or rely on media.**





## TOP THINGS FOR INTERVIEWS

Make the room work for you (visit ahead of time if possible)

Be enthusiastic about project.

Be memorable.

Focus on the client and be friendly.

Be project and client specific...





## TOP THINGS FOR INTERVIEWS

Identify the “Big Idea” early

Identify special tie breaker issues

Handouts are helpful... Before and After

Do not try to go around the system by talking to Board Members or others in leadership positions.

Focus on the Client’s Client

Why select our firm? Give them reasons.

*“Respect the process.”*

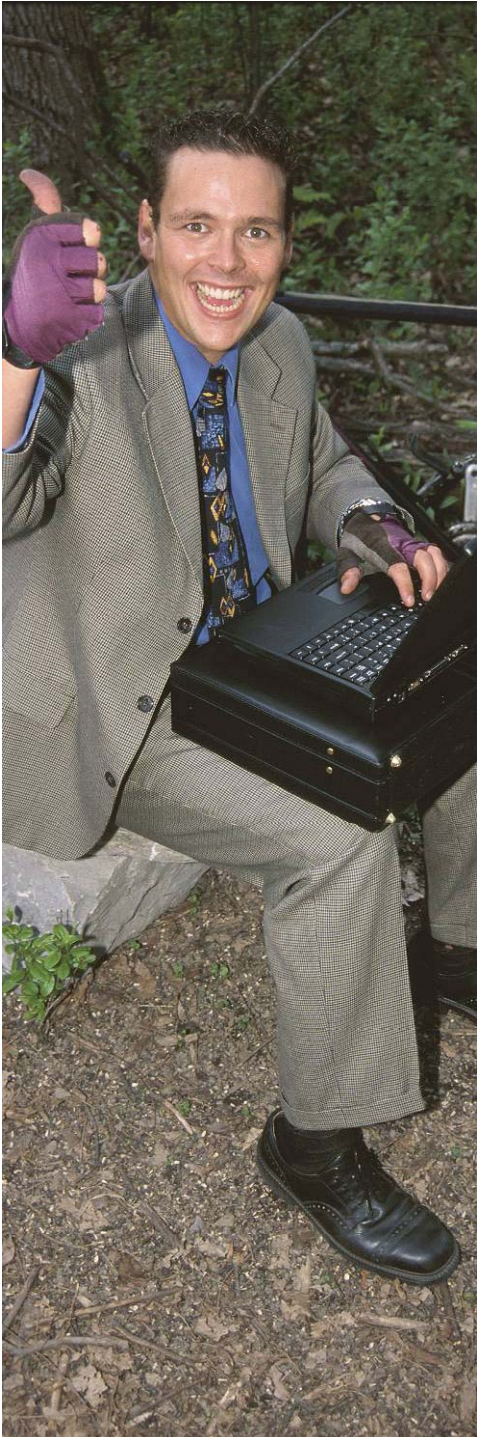
Paul Davis Boney, FAIA





**SO, YOU GOT THE JOB!**





## **AFTER SELECTION**

**Say thank you... and mean it!**

**Know that there are 50 disappointed firms and treat each other as professionals and with respect.**

**No bait & switch... follow through with promises**

**Does marketing out run the ability to deliver?**

**Provide outstanding service... "It is your best marketing for the next job."**

*"Do what you said you were going to do... Promise Made!"*

**Paul Davis Boney, FAIA**



**THANK YOU!**

**QUESTIONS?**



## **REFERENCE WEBSITES**

**General Statutes (NC General Assembly)**

[www.ncleg.net](http://www.ncleg.net)

**Rules (NC Office of Administration Hearings)**

[www.oah.state.nc.us/rules](http://www.oah.state.nc.us/rules)

**State Construction Office**

[www.nc-sco.com](http://www.nc-sco.com)

**North Carolina Interactive Purchasing System**

[www.ips.state.nc.us](http://www.ips.state.nc.us)

**The University of North Carolina System**

[www.northcarolina.edu](http://www.northcarolina.edu)

